

Lucerne University of
Applied Sciences and Arts

**HOCHSCHULE
LUZERN**

Business

IFZ Conference

International Estate Planning Summit 2018

Latest trends in Estate Planning from a Swiss and Multijurisdictional Perspective

Welcome Dinner: 21 June 2018, 6:45 p.m., Parkhotel Zug, Industriestrasse 14, 6302 Zug

Summit: 22 June 2018, 8:45 a.m. – 5:30 p.m., Hochschule Luzern – Wirtschaft, IFZ, Zug

Institute of Financial Services Zug IFZ

www.hslu.ch/ifz-conferences

International Estate Planning Summit 2018

Program Description

This «International Estate Planning Summit» is aimed at discussing and analyzing important aspects of international estate planning and tax transparency for a number of selected countries. The Summit will focus mainly on aspects that should be considered in tax and wealth planning for high net worth individuals and corporations from a multijurisdictional perspective.

In the morning, outstanding practitioners and scholars will share their expertise and experience on the latest trends on estate planning. This will include an overview of the current political landscape from a tax and regulatory perspective. Following that, the Summit will cover the recent developments in international tax transparency, focusing amongst other topics on the impact of BEPS and the Exchange of Information from a Swiss and from a Liechtenstein perspective, crypto currencies, holding companies and wealth management structures.

Also, the Summit will include an overview of wealth management and tax planning structures for Brazilian and Argentinian high net worth individuals. This will be followed by a panel discussion with case studies on asset protection in Switzerland, Liechtenstein, the United Kingdom and the United States.

In the afternoon, this Summit will analyse forced heirship rules in Switzerland, the United States, Italy, Austria and Spain on the basis of case studies. After that, the Summit will deal with digital estate planning (mails, cryptocurrencies, online accounts, amongst others).

The Summit will also cover the latest trends in global residency and citizenship matters, and the alternative use of life insurance for US and UK resident individuals with practical case studies. Finally, a panel discussion with case studies on real estate investment from a regulatory and tax perspective in Switzerland and Italy will take place.

Speakers

Gian Brändli, Bär und Karrer, Zurich; **Dr. Lennart Chrobak**, University of Zurich, Zurich; **Raphael Cica**, KENDRIS AG, Zurich; **Giulia Cipollini**, Withers, Milano; **Robert Desax**, Walder Wyss AG, Zurich; **Frederico de Almeida Fonseca**, Rolim, Viotti e Leite Campos Advogados, Sao Paulo; **Laura Nanette Gambineri**, LL.M., Crown Global Insurance Group Zurich; **Riccardo Gambineri**, Crown Global Insurance Group, Zurich; **Alex Geissbühler**, Geissbühler Weber & Partner, Zurich; **Dr. Werner Jahnel**, LALIVE, Zurich; **Dr. Christian H. Kälin TEP IMCM**, Henley & Partners Ltd, Zurich; **Prof. Dr. Hans Rainer Künzle**, KENDRIS AG, Zurich/ University of Zurich, Zurich; **Alexandra Maeder**, Maeder Recht Derecho, Bern; **Dr. Roland A. Pfister**, Lucerne University of Applied Sciences and Arts/Badertscher Rechtsanwälte, Zurich/Zug; **Christoph Suter**, Bär und Karrer, Geneva; **Anna Szkudlarek**, KENDRIS AG, Zurich; **Sergio Mitsuo Vilela**, Julius Baer, Zurich; **Jacopo Zamboni**, Henley & Partners Ltd, Zurich

Program

| | |
|------------|---|
| 08:45 a.m. | Introduction and Welcome Dr. Roland A. Pfister |
| 08:50 a.m. | Overview of the Political Landscape from Tax and Regulatory Perspectives Recent developments and changes in the political landscape of Switzerland from a regulatory and tax perspective with regard to asset management companies, family offices and banks. Dr. Roland A. Pfister, Christoph Suter, Alex Geissbühler |
| 09:30 a.m. | Recent Developments on Tax Transparency and potential Tax Controversies Territorial scope of the common reporting standard from a Swiss and Liechtenstein perspective, crypto currencies, holding companies and wealth management structures (foundations and trusts) which may lead to disputes with tax authorities. Anna Szkudlarek, Robert Desax |
| 10:15 a.m. | Coffee break |
| 10:45 a.m. | Asset Protection in Selected Jurisdictions Overview and case studies on asset protection in Switzerland, Liechtenstein, the United Kingdom and the United States. Prof. Dr. Hans Rainer Künzle |
| 11:30 a.m. | The Necessity of Estate Planning for Brazilian and Argentinian High Net Worth Individuals Overview of wealth management structures and tax planning structures for Brazilian and Argentinian high net worth individuals. Frederico de Almeida Fonseca, Sergio Mitsuo Vilela |
| 12:15 p.m. | Lunch |
| 02:00 p.m. | Panel Discussion on Forced Heirship Rules Estate planning focusing on forced heirship rules in selected countries with case studies: Switzerland, United States, Italy, Austria and Spain. Raphael Cica (Switzerland/United States), Giulia Cipollini (Italy), Dr. Werner Jahnel (Austria), Alexandra Maeder (Spain) |
| 02:45 p.m. | Digital Estate Planning Overview on access to mails, crypto currency accounts, online accounts and digital estate planning tools. Dr. Lennart Chrobak |
| 03:30 p.m. | Coffee break |

| | |
|------------|--|
| 03:45 p.m. | Global Residency and Citizenship Latest trends and opportunities with case studies. Dr. Christian H. Kälin, Jacopo Zamboni |
| 04:20 p.m. | Use of Life Insurance for US and UK Resident Individuals for Estate and Tax Purposes Latest trends and opportunities with case study. Riccardo Gambineri, Laura Nanette Gambineri, LL.M. |
| 04:40 p.m. | Estate Planning Solutions for Swiss and Italian High Net Worth Individuals and Corporations from Inbound and Outbound Perspectives, Focusing on Case Studies Latest trends and opportunities with case studies from a Swiss and Italian perspective. Gian Brändli (Switzerland), Giulia Cipollini (Italy) |
| 05:30 p.m. | Closing words/Apéro |

Organisation

Target Groups

Employees, family offices, bankers, tax consultants, trustees, fund managers, asset managers, auditors, lawyers, government officers, practitioners, consultants, accountants in financial market industries, financial intermediaries and investors, in particular from Argentina, Brazil, Switzerland, Italy, Austria, Spain, Liechtenstein, the United Kingdom and the United States.

Date & Time

Friday, 22 June 2018, 8:45 a.m. – 5:30 p.m.

A welcome dinner will be held the evening before, on 21 June 2018, 6:45 p.m.

Cost

- CHF 690.–, per person, including conference materials, lunch and apéro.
- CHF 940.–, per person including the welcome dinner on the evening of 21 June 2018.

Venue

The Summit will be held at the Institute of Financial Services Zug IFZ, located two minutes' walk from the train station of Zug. You will reach Zug in 30 minutes from Zurich via train or car.

Hotel

If you require hotel accommodations, we recommend the Park Hotel Zug: www.parkhotel.ch.

Application

Deadline is 1 June 2018

Lucerne School of Business, Institute of Financial Services Zug IFZ
Grafenauweg 10, P.O.Box 7344, 6302 Zug
T +41 41 757 67 67, F +41 41 757 67 00, ifz@hslu.ch

Registration will be first-come, first-served and is limited.

Information

www.hslu.ch/ifz-conferences

Special thanks go to our sponsors

Golden Sponsors



Silver Sponsor



Contact

Lucerne School of Business

Institute of Financial Services Zug IFZ

Grafenauweg 10

P.O. Box 7344

6302 Zug

Switzerland

T +41 41 757 67 67

ifz@hslu.ch

www.hslu.ch/ifz



blog.hslu.ch/ifz



www.facebook.com/ifz.zug



www.linkedin.com/company/ifz-zug



www.twitter.com/IFZ_Zug